COLORADO IMMUNIZATION INFORMATION SYSTEM REMINDER/RECALL TRAINING GUIDE

(for Providers/Clinics, and Local Public Health Agencies)

TOPICS COVERED

- Reminder/Recall Definitions (slide 3)
- Add a Provider Reminder/Recall (slides 9 to 22)
- Add a County/Zip Code Level Reminder/Recall (slides 23 to 28)
- View Reminder/Recall Results (slides 29 to 33)
- Add a Reprocess Run (slides 34 to 35)
- Resources (slide 38)

REMINDER/RECALL: DEFINITIONS

- **Reminder** – A list or report that pulls all patients meeting your search criteria who are **coming due** for immunizations.
- **Recall** – A list or report that pulls all patients meeting your search criteria who are **overdue** for immunizations.
- **Provider Reminder/Recall** – Allows you to run a reminder or recall for patients registered to your provider/clinic.
- **County/Zip Code Level Reminder/Recall** – This type of reminder/recall can ***ONLY*** be run by a Local Public Health Agency (LPHA). Allows the LPHA to run a reminder/recall for patients within their county/counties or zip code(s).

REMINDER/RECALL USER ACCESS IN CIIS

- At the provider/clinic level, access to the CIIS reminder/recall functionality is permission-based. A Data Quality Review may be required before your provider/clinic can receive access to reminder/recall.

DATA QUALITY REVIEW

- If it is determined that a data quality review is necessary, CIIS staff will review 30-40 patient records for accuracy and completeness. The process may require further clean-up depending on the accuracy of the data. Once a provider/clinic meets or exceeds CIIS data quality standards, they may move forward with reminder/recall. CIIS Staff will assist your clinic in this process.

- Data Quality Review is ***NOT*** required for LPHAs that want to run county/zip code level reminder/recalls.

- For more information about the Data Quality Review, contact the CIIS Help Desk at 1-888-611-9918, option 2.

REPORTS FOR IMPROVING DATA QUALITY

- The following CIIS Reports can be run by the provider/clinic and are recommended prior to conducting a reminder/recall. These reports can be accessed from the CIIS *Reports/Forms* module.

  - **Patients with Possible Duplicate Vaccinations (Data Quality Report Category)**
    - Generates a list of patients that have multiple vaccinations within the specified number of days within the same vaccine group (e.g., two DTaP doses within 14 days of each other). Providers reporting to CIIS electronically will need to contact the CIIS Help Desk to resolve possible duplicate vaccinations on a patient's record.

  - **Vaccines Added But Not Administered (Data Quality Report Category)**
    - Generates a list of patients with vaccinations that have been added but not administered within the system. (Please note: Vaccines that are added but not administered are automatically deleted 35 days after the immunization date if they have not been fully administered on a patient's record in CIIS.)

REPORTS FOR IMPROVING DATA QUALITY

- **Patient Roster (Patient Management Report Category)**
  - Generates a list of patients grouped by their default provider/clinic. Allows sites to designate clients who have moved or gone elsewhere (MOGE) and are no longer seen by the provider.

- **Possible Patient Duplicates (Data Quality Report Category)**
  - Generates a list of the clinic's possible patient duplicates. Once identified, duplicate patient records will be reviewed and reconciled by CIIS staff.

IDENTIFY PATIENT DUPLICATES

- Providers/clinics can identify patient duplicates in CIIS so that they can be reviewed and reconciled by CIIS staff. This will eliminate sending duplicate reminder/recall notices to the same patient.

  - View a short tutorial on how to *Mark a Patient Duplicate* by visiting www.coloradoiis.com. Next click on *Training* and select *For general health care providers*. Select *Quick Guides and Job Aids.* This tutorial will be listed under *Job Aids.*

ADD REMINDER/RECALL: KEY TERMS

- **Run Name** – Describes or identifies a specific reminder/recall run on the listing screen (e.g., Recall CDPHE 19-35 mos.)
- **Provider** – Patient's Default Provider
- **Clinic** – Patient's Default Clinic
- **County** – Patients with an address in this county will be selected in the reminder/recall.
- **Zip Code** – Patients with an address in this zip code will be selected in the reminder/recall.
- **Run Schedule Date** – Date when this reminder/recall run will be processed.
  - **Note**: Reminder/Recall requests are run overnight. For example, if your *Run Schedule Date* is 01/30/2014, your *Reminder/Recall* report will be processed by CIIS and ready for you to view by 01/31/2014.

ADD REMINDER/RECALL: KEY TERMS

- **Run Completed Date** – This is a read-only field and is set by the system when the job (reminder/recall) has been processed.
- **Reminder/Recall Date Range**:
  - **From** – Earliest date of vaccinations for the reminder/recall run.
  - **Through** – Latest date of vaccinations for the reminder/recall run.

ADD REMINDER/RECALL: KEY TERMS

- **Age Range**:
  - **From** – Minimum age in months or years for a patient to be included in the reminder/recall run. (Whatever age range you specify will be calculated off the *From* Date.)
  - **Through** – Maximum age in months or years for a patient to be included in the reminder/recall run.
  - **UOM** – Unit of measure (months or years)

  NOTE: It is important that you ***LIMIT*** the age range. Entering too large of an age range may overload the system. Keep in mind that the age range you enter will depend on the vaccine or vaccine series that you want to look at in your reminder/recall. For example, if you want to determine which patients are overdue for their fourth dose of DTaP, you might use an age range of 19 – 35 months.

ADD REMINDER/RECALL: KEY TERMS

- **Gender** – You can select *Male, Female*, or *Both*.
- **Ignore Setting For "Do Not Include Patient in Reminder/Recall"** – Checking this option will allow those patients to be included in the reminder/recall regardless of whether or not the "Do Not Include Patient in Reminder/Recall" option on the patient demographics screen has been indicated for the specific patient.
- **Only Include Patients With Address** – Limit the results to only those patients that have an address within CIIS.

Please note: If you are interested in other options for targeting certain patients in your reminder/recall (e.g., *VFC Eligibility*) please contact the CIIS Help Desk for further assistance.

ADD REMINDER/RECALL: KEY TERMS

- **Increment Patient Reminders/Recall Count** – Indicates this reminder/recall should be included when counting the number of reminders and/or recalls for a patient.
- **Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination** – Ignore patients with "X" number of reminders/recalls without a vaccination.
  - We recommend that patients be included in no more than 3 – 5 recalls within the same age range and criteria.

ADD REMINDER/RECALL: KEY TERMS

- **Generate Reminder Event** – Create a system-generated reminder event in the *Patient Events* screen.
- **Include Patients Due For Vaccinations (Reminders)** - Check this to target patients coming due for vaccinations.

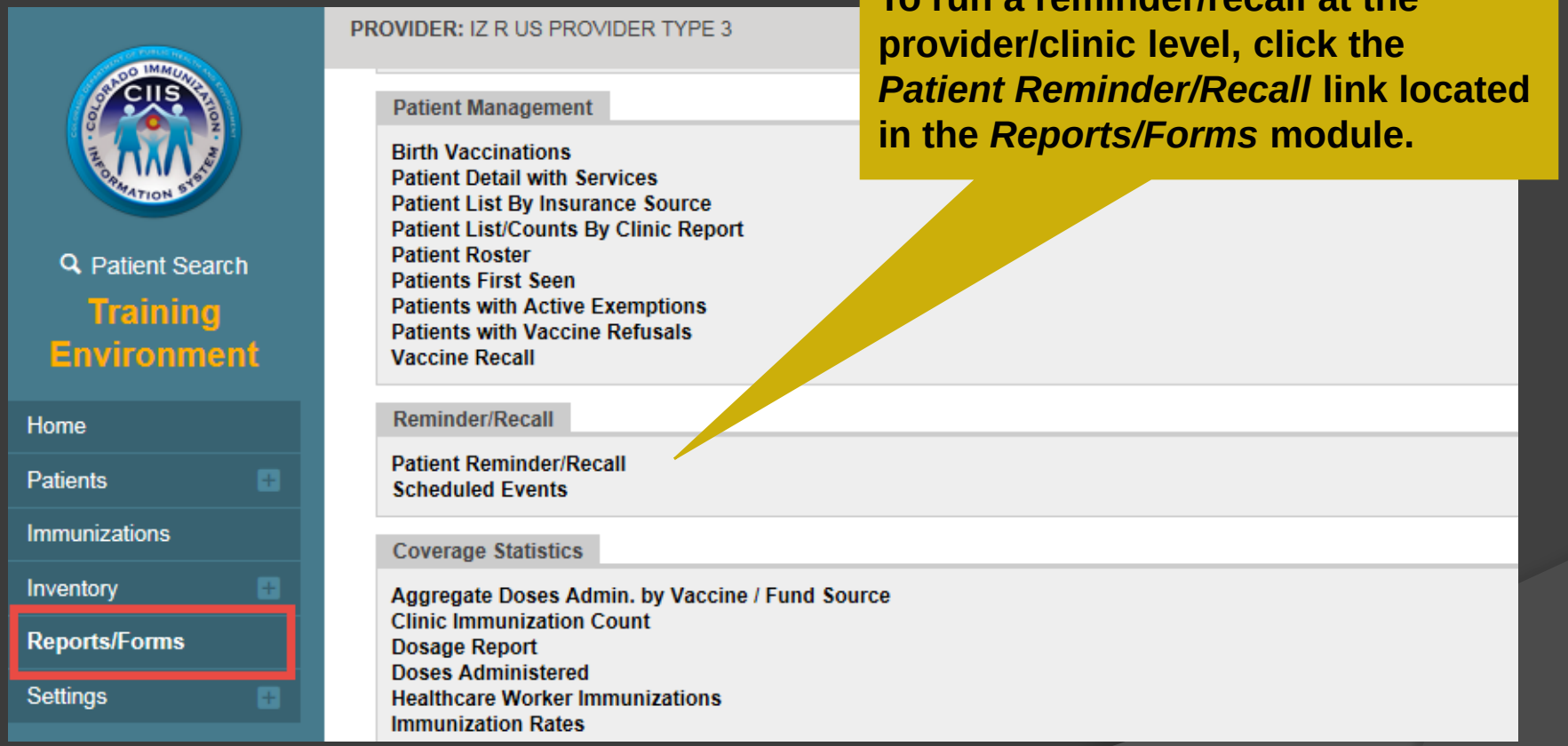
ADD REMINDER/RECALL: KEY TERMS

- **Include Patients Overdue For Vaccinations (Recalls)** – Check this option to include patients who are overdue for vaccinations.
  - **Minimum Number Of Days Past Due To Include** – Optional field to specify the minimum number of days a patient must be overdue before they are included.
  - **Maximum Number Of Days Past Due To Include** – Optional field to specify the maximum number of days a patient can be overdue and still be included.

ADD REMINDER/RECALL: KEY TERMS

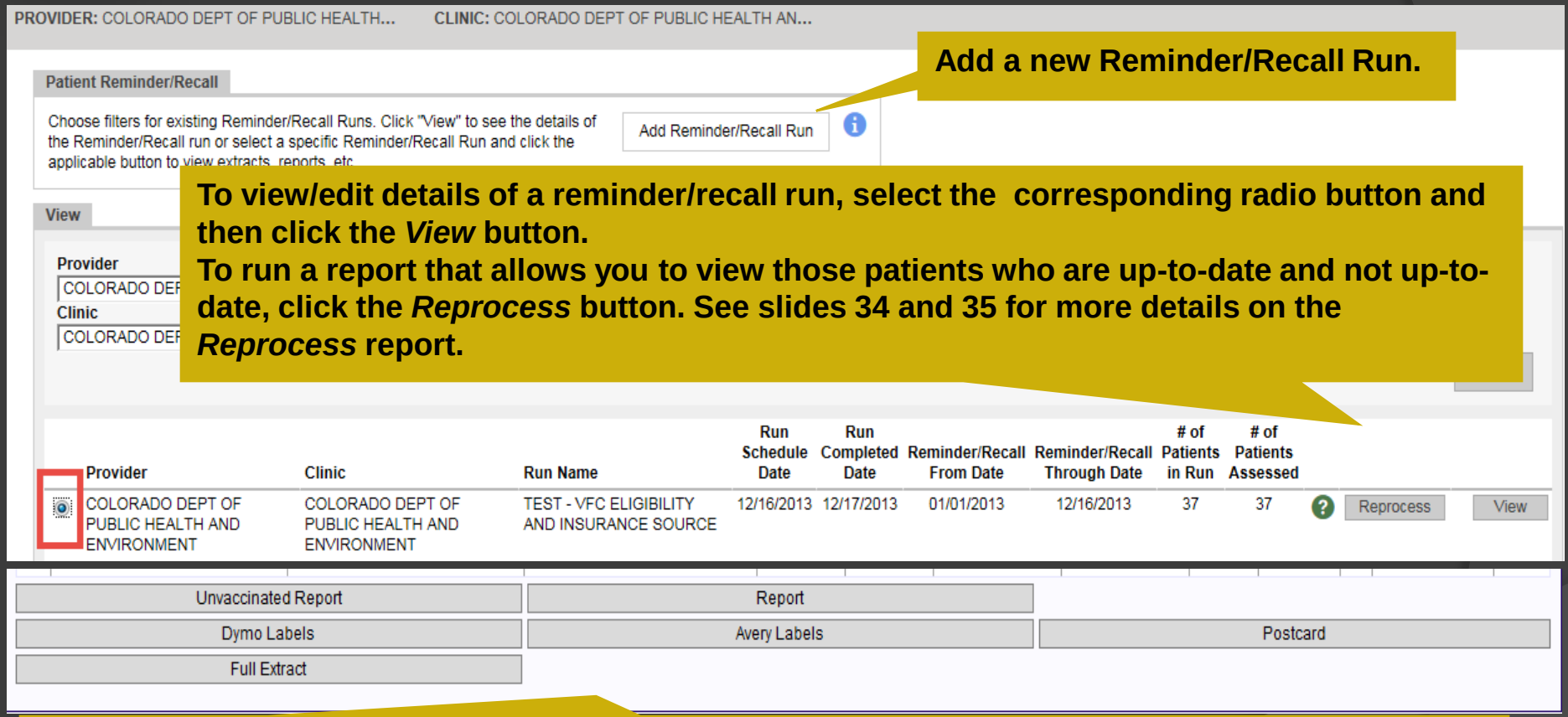
- **Exclude Patients with Less than 2 non- Influenza/H1N1 Vaccinations** – Filters out patients with less than two non-Influenza/H1N1 vaccinations in their record (e.g., a record that came from State Vital Statistics with only the birth dose of Hep B dose recorded).
- **Exclude Patients with One or More Vaccine Refusals** – Filters out patients who have refused one or more vaccines.
- **Vaccine Series and Optional Dose** – Allows you to select the vaccine series (and optional dose number, if applicable) that should be assessed when determining the patients who are included in the results.

ACCESS REMINDER/RECALL (PROVIDER/CLINIC)



To run a reminder/recall at the provider/clinic level, click the *Patient Reminder/Recall* link located in the *Reports/Forms* module.

PATIENT REMINDER/RECALL SCREEN OVERVIEW (Provider/Clinic)



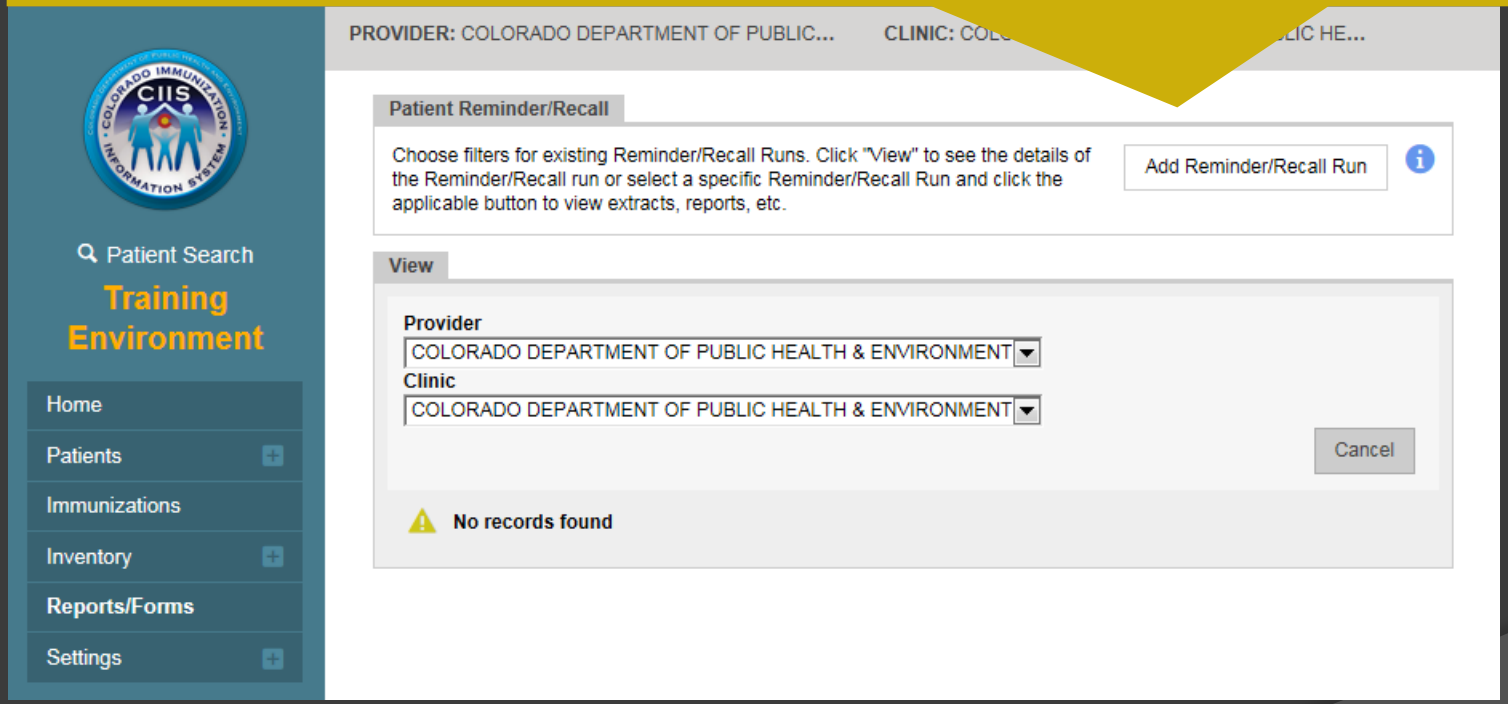
Add a new Reminder/Recall Run.

To view/edit details of a reminder/recall run, select the corresponding radio button and then click the *View* button.
To run a report that allows you to view those patients who are up-to-date and not up-to-date, click the *Reprocess* button. See slides 34 and 35 for more details on the *Reprocess* report.

Output formats include reports (PDF), extracts (Excel), and labels. See slides 29-33 for definitions/samples of output formats. *Remember* to click the radio button that corresponds to your completed reminder/recall before clicking one of the gray output buttons.

HOW TO ADD A REMINDER/RECALL RUN (PROVIDER/CLINIC LEVEL)

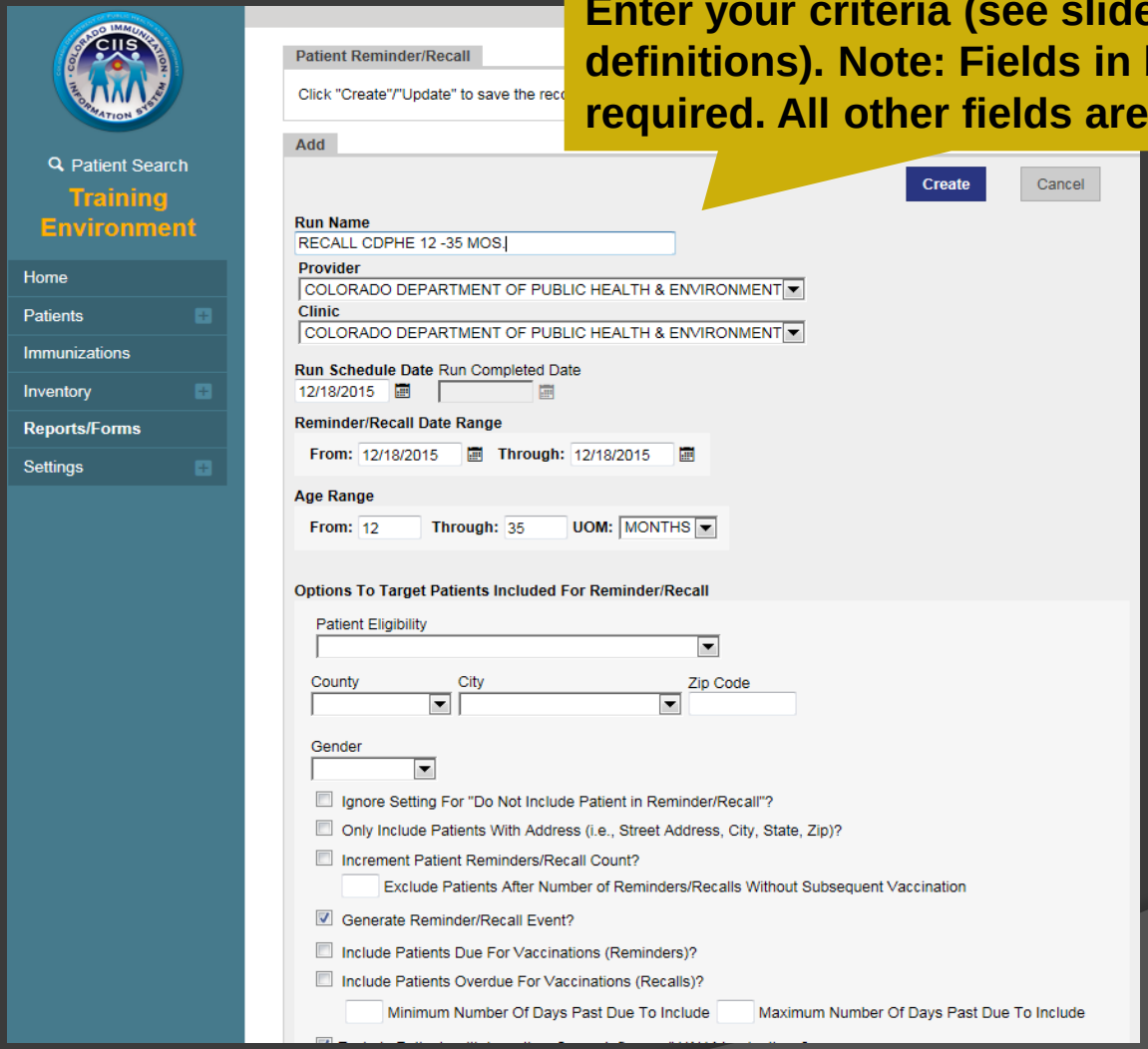
To add a reminder/recall, click the *Add Reminder/Recall Run* button located on the *Patient Reminder/Recall* screen.



HOW TO ADD A REMINDER/RECALL RUN

Provider/Clinic (Continued)

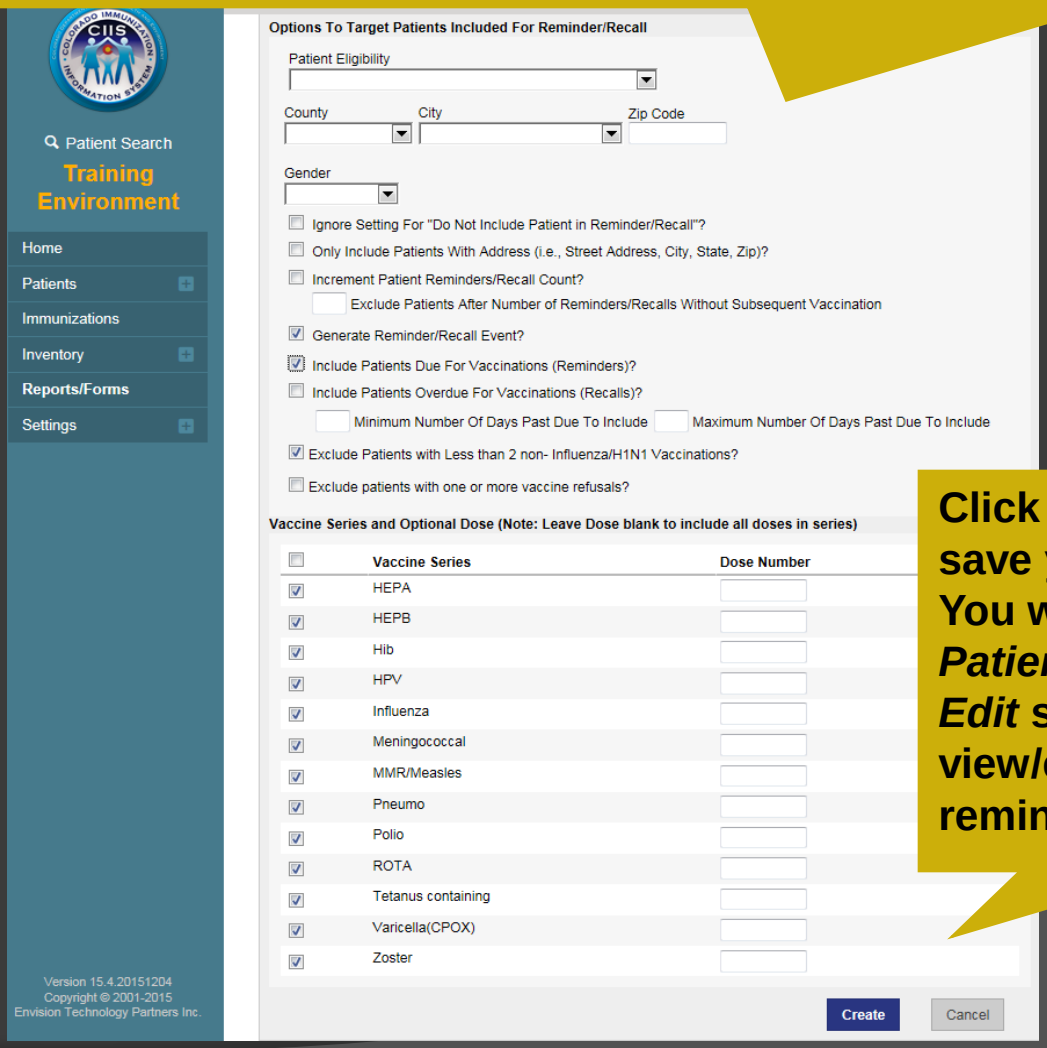
Enter your criteria (see slides 9-16 for definitions). Note: Fields in bold are required. All other fields are optional.



HOW TO ADD A REMINDER/RECALL RUN

Provider/Clinic (Continued)

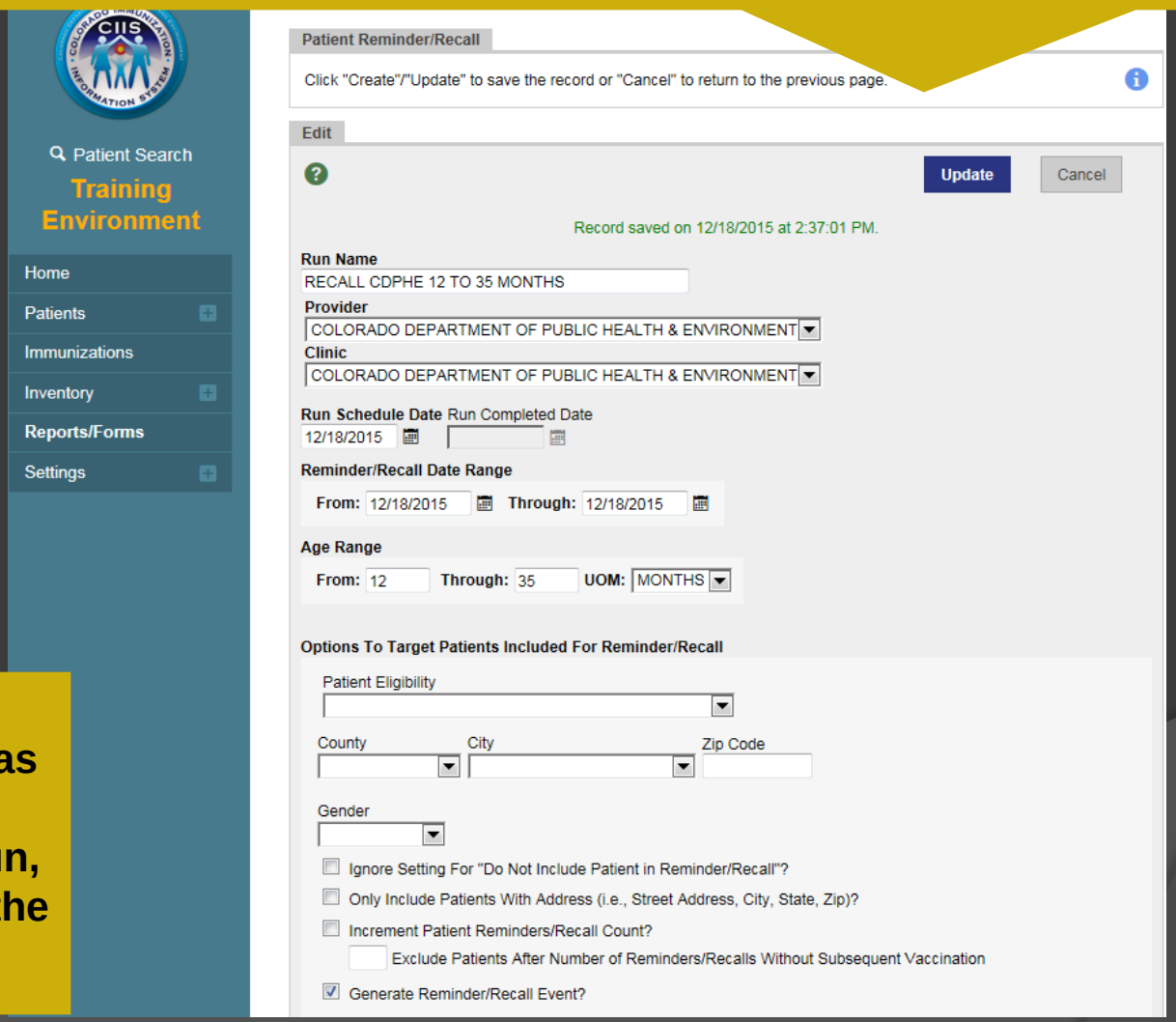
You may select the additional filters used to define the patients who will be included in the results (see slides 9-16 for definitions).



Click the *Create* button to save your reminder/recall. You will now be taken to the *Patient Reminder/Recall Edit* screen, where you can view/edit your saved reminder/recall record.

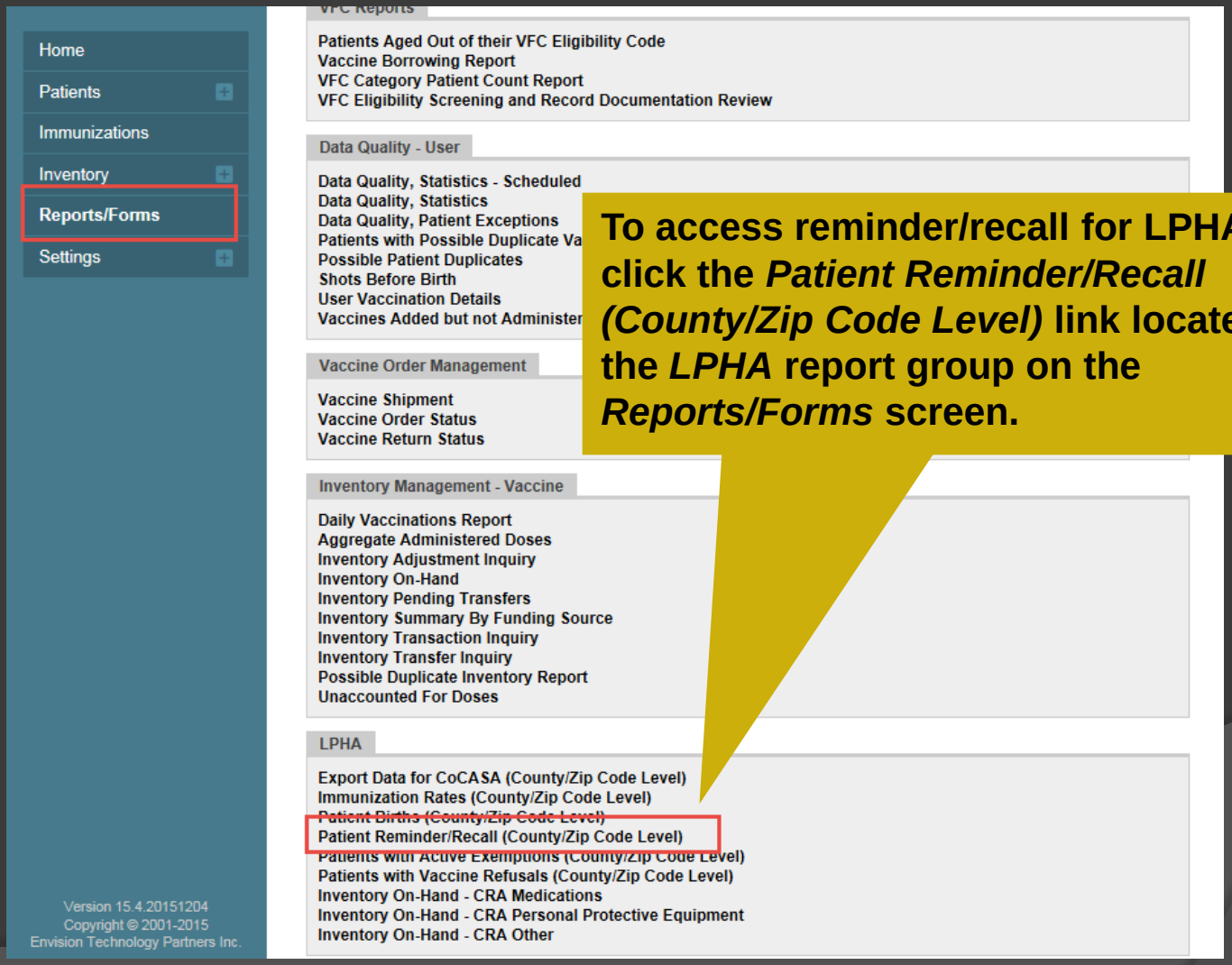
EDIT REMINDER/RECALL (Provider/Clinic)

From this screen, you can view/edit the details of your saved reminder/recall record. Click the *Update* button to save any changes, or click the *Cancel* button to return to the *Patient Reminder/Recall* screen.



Note: Any edits made after CIIS has processed the reminder/recall run, will *NOT* change the report results.

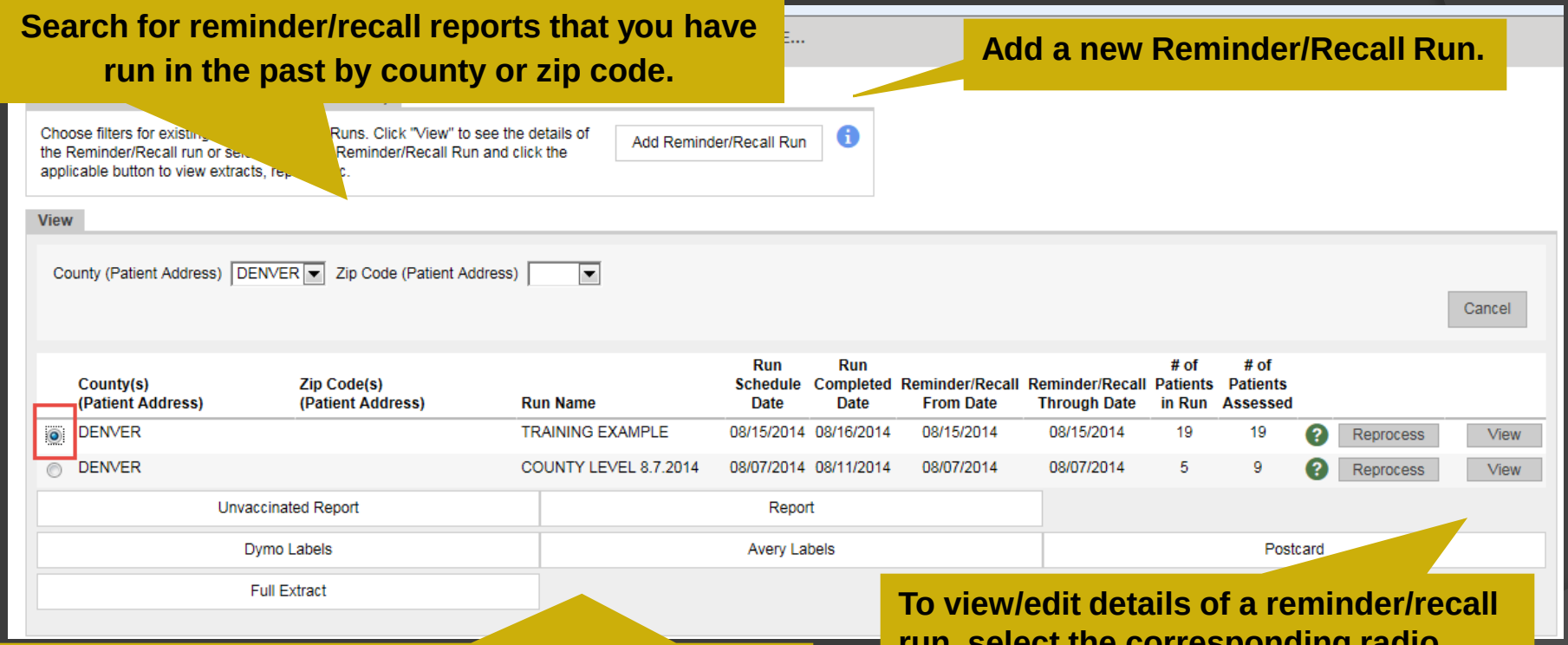
REMINDER/RECALL ACCESS (LPHA)



COUNTY/ZIP CODE REMINDER/RECALL SCREEN OVERVIEW (LPHA)

Search for reminder/recall reports that you have run in the past by county or zip code.

Add a new Reminder/Recall Run.

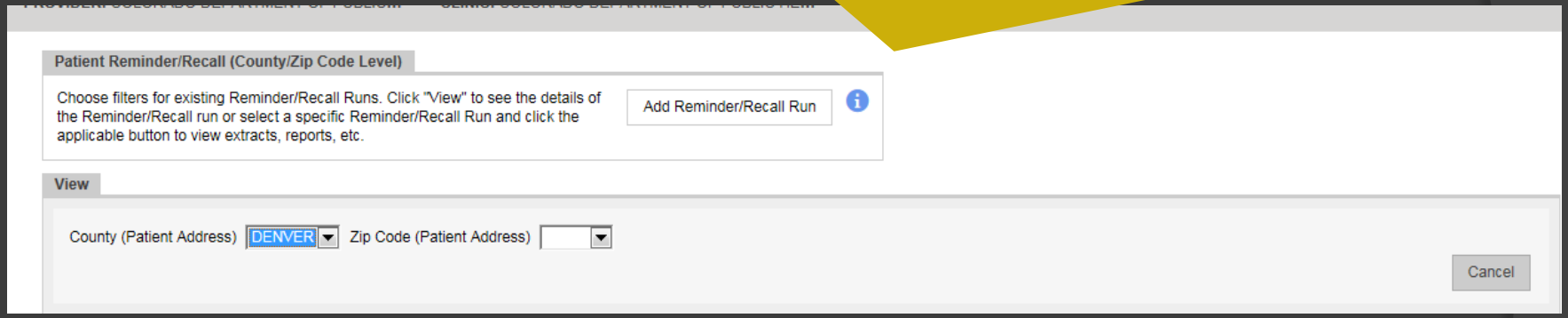


Output formats include reports (PDF), extracts (Excel), and labels. See slides 29-33 for definitions/samples of output formats. *Remember* to click the radio button that corresponds to your completed reminder/recall before clicking one of the gray output buttons.

To view/edit details of a reminder/recall run, select the corresponding radio button and then click the *View* button. To run a report that allows you to view those patients who are up-to-date and not up-to-date, click the *Reprocess* button. See slides 34 and 35 for more details on the *Reprocess* report.

HOW TO ADD A REMINDER/RECALL (LPHA)

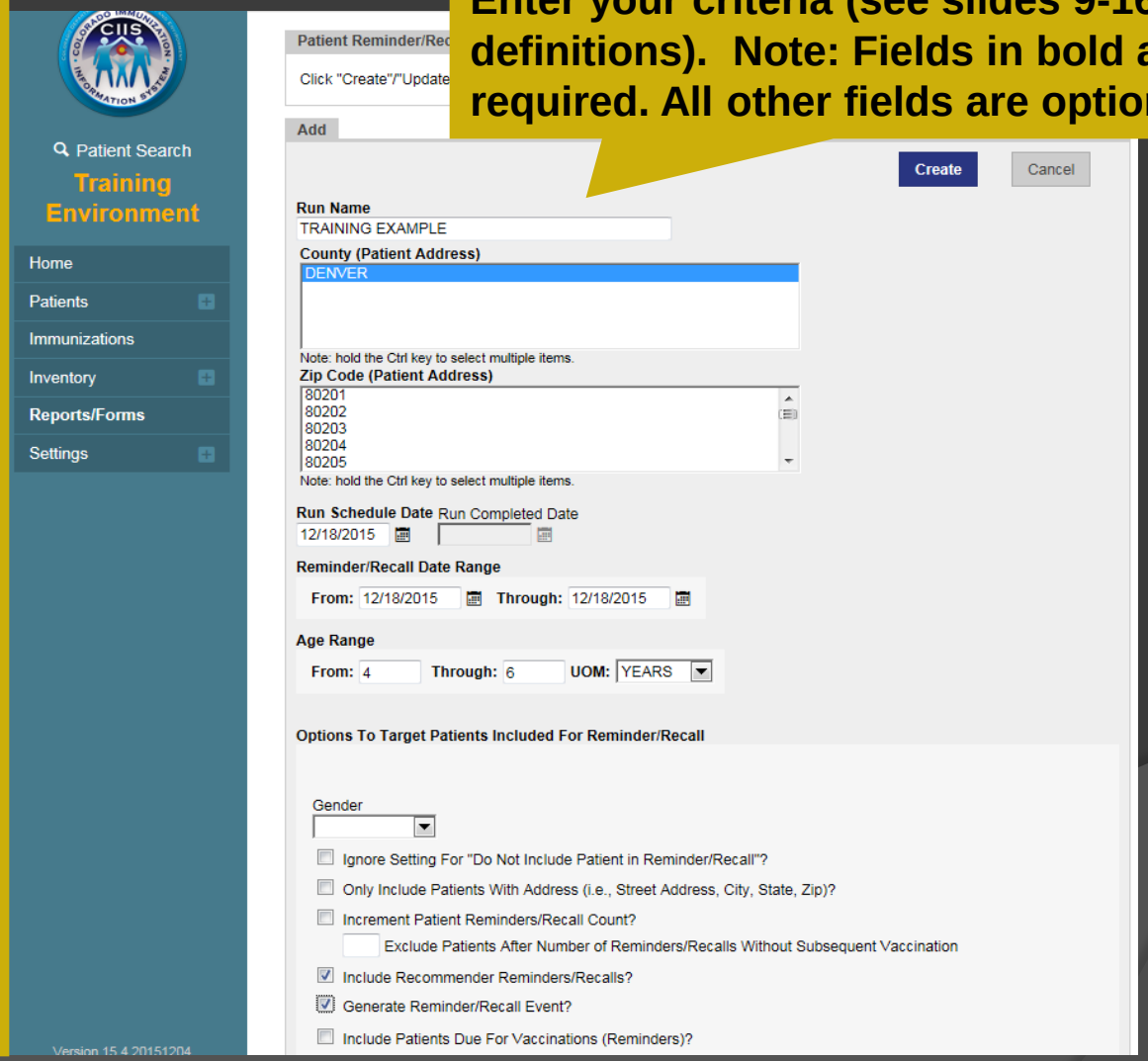
To add a reminder/recall, click the *Add Reminder/Recall Run* button located on the Reminder/Recall Home screen.



HOW TO ADD A REMINDER/RECALL RUN LPHA (Continued)

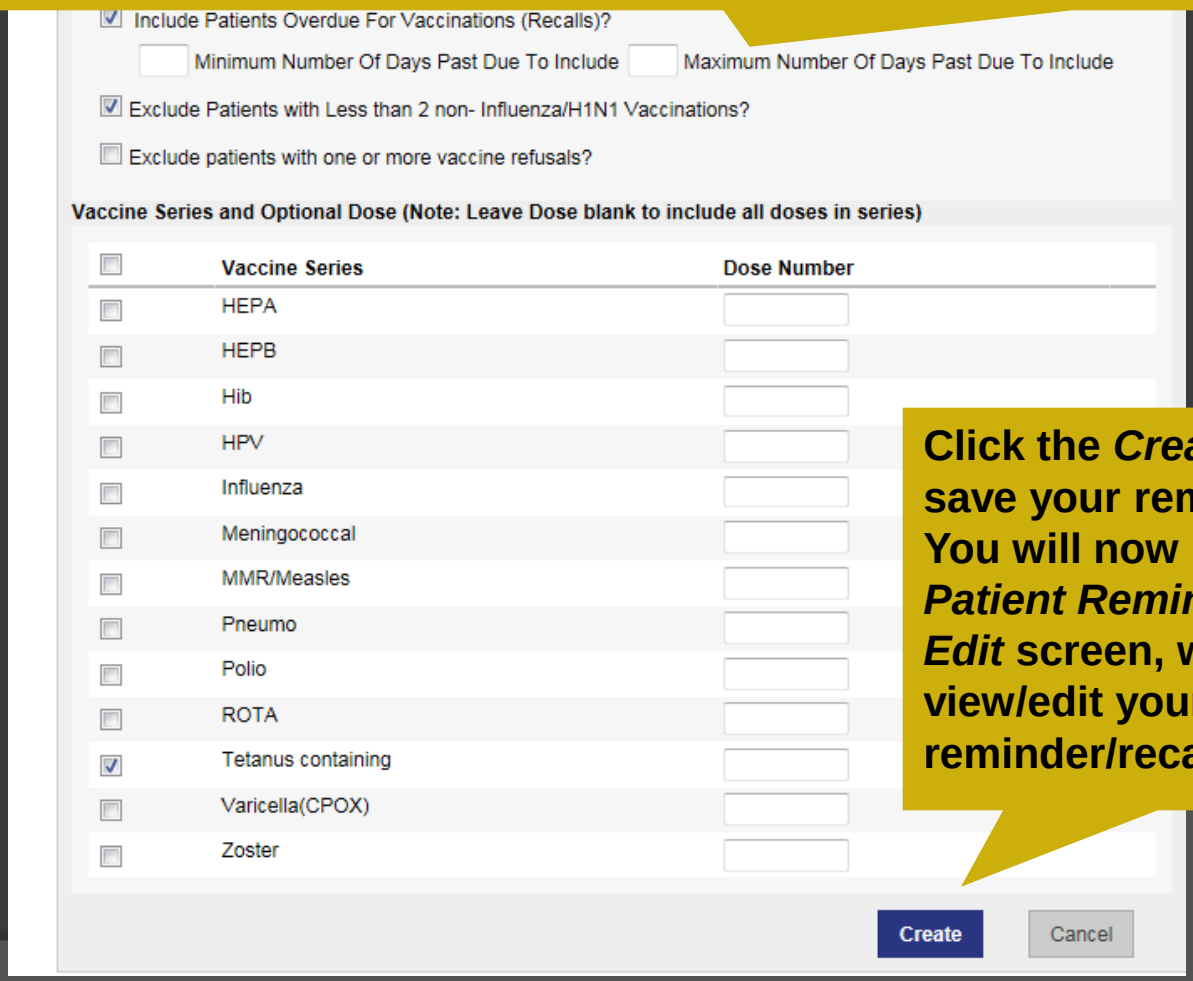
***REMEMBER*: You must select *EITHER* a county/counties *OR* zip code(s) when running a reminder/recall at the County/Zip Code Level. Decide if you want to pull patients meeting your search criteria at the county level (i.e., all patients located in that county/counties) or at the zip code level (i.e., all patients located within that zip code(s).**

Enter your criteria (see slides 9-16 for definitions). Note: Fields in bold are required. All other fields are optional.



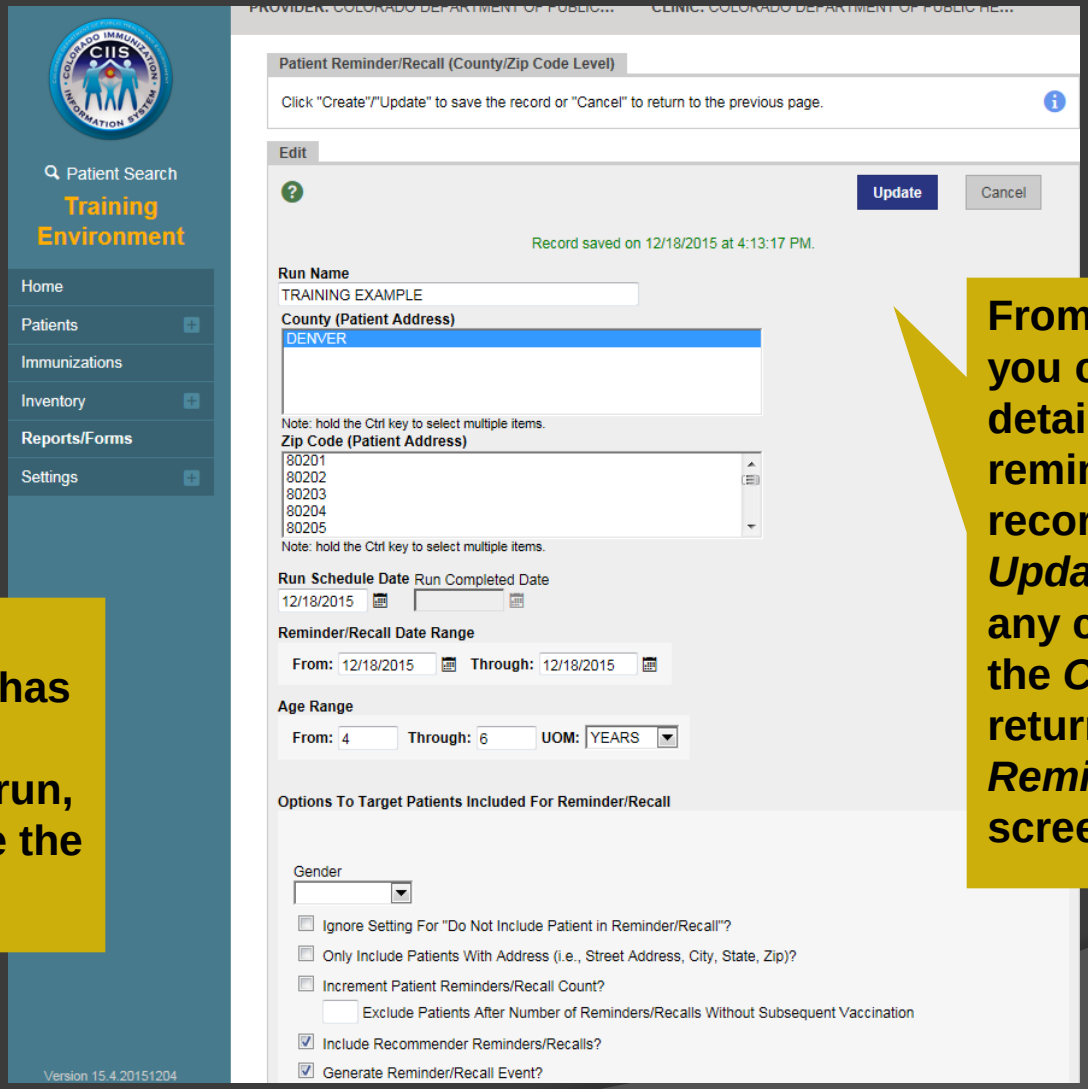
HOW TO ADD A REMINDER/RECALL LPHA (Continued)

Select additional filters and the Vaccine(s) to define the patients who will be included in the results (see slides 9-16 for definitions).



Click the *Create* button to save your reminder/recall. You will now be taken to the *Patient Reminder/Recall Edit* screen, where you can view/edit your saved reminder/recall record.

EDIT REMINDER/RECALL (LPHA)



From the *Edit* screen, you can view/edit the details of your saved reminder/recall record. Click the *Update* button to save any changes, or click the *Cancel* button to return to the *Patient Reminder/Recall* screen.

Note: Any edits made after CIIS has processed the reminder/recall run, will *NOT* change the report results.

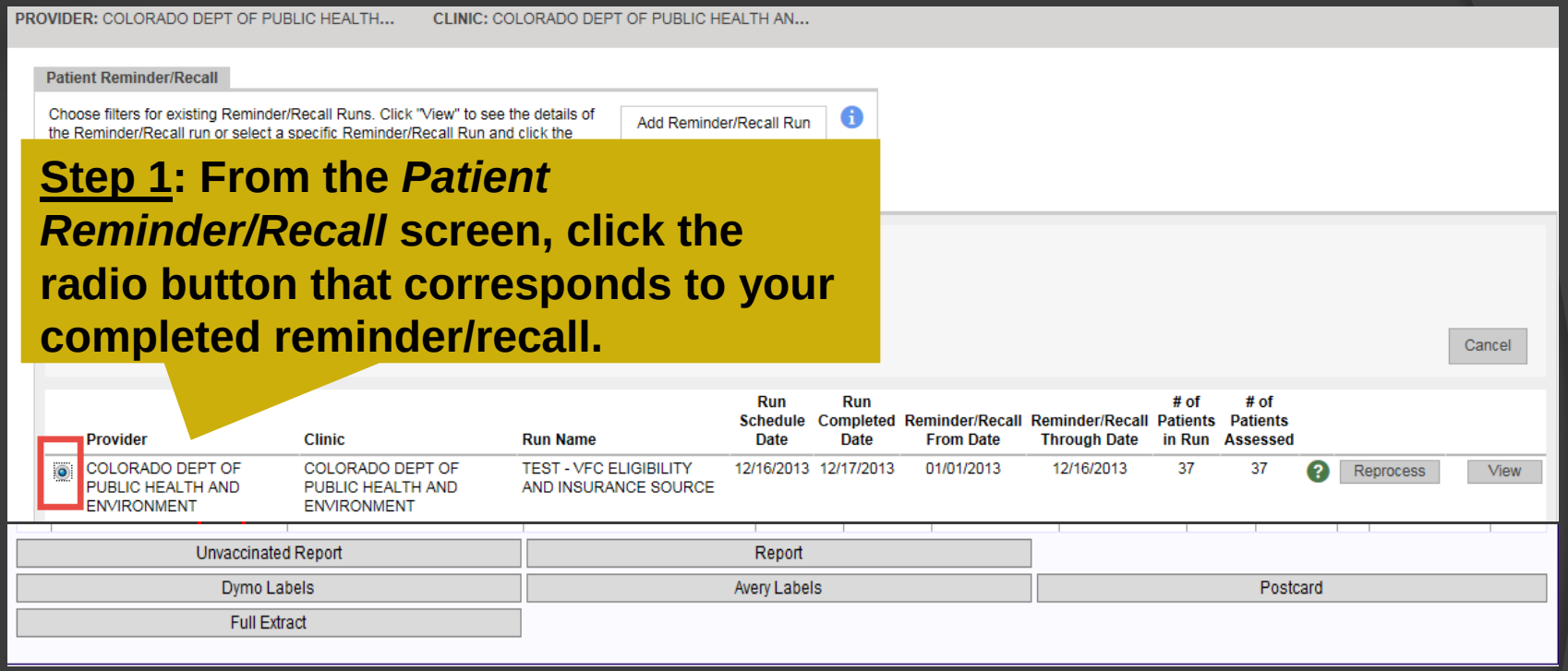
REMINDER/RECALL REPORT: KEY TERMS

- **Reprocess** – Clicking on the *Reprocess* button will take the original set of patients that appeared on the reminder/recall run and compare any updated data in the database against the patient's original immunization recommendations. If a patient is now up-to-date, she/he will appear on the *Up-to-Date* report. If the patient is still missing one or more vaccinations he/she will remain on the *Not Up-to-Date* report.
- **View** – Displays the Edit Reminder/Recall screen.
- **Unvaccinated Report** – Shows all patients included in the Reminder/Recall run that have NOT come back for a vaccination.
- **Report** – Detailed listing of patients included in the reminder/recall results.
- **Extract** – Generates a character-delimited version of the results (e.g., Excel). Useful for importing the data into another system (e.g., a mail-merge application for generating custom letters) and for sorting/manipulating the results.

REMINDER/RECALL MAILING MATERIALS

- **Dymo Labels** – Generate labels (formatted for a Dymo Label printer) for each patient in the results.
- **Avery Labels** – Generate labels (formatted for commercially available 5160 Avery label stock) for each patient in the results.
- **Postcard** – Generate postcards (formatted for commercially available pre-printed postcard stock) for each patient in the results. Contact the CIIS Help Desk for information on how to order generic postcards.

VIEW REMINDER/RECALL OUTPUT/RESULTS



Step 1: From the *Patient Reminder/Recall* screen, click the radio button that corresponds to your completed reminder/recall.

Step 2: Click the gray button that corresponds to the output format you would like to view. Output formats include reports (PDF), extracts (Excel), and mailing labels.

REMINDER/RECALL REPORT: PDF OUTPUT

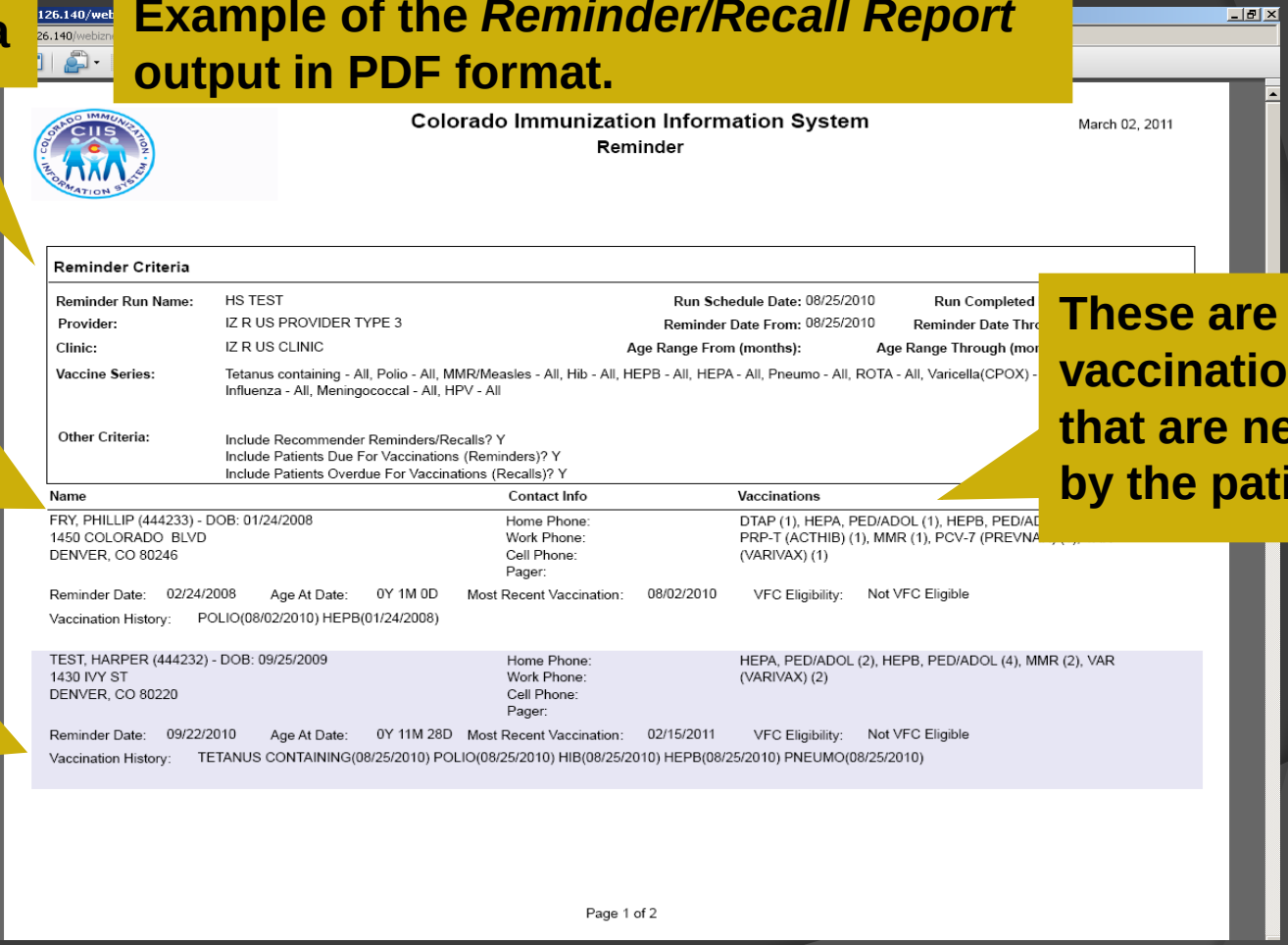
Reminder Criteria

Example of the *Reminder/Recall Report* output in PDF format.

Patient Information (lists patients alphabetically by last name)

These are the vaccinations the patient has already received.

These are the vaccinations that are needed by the patient.



Colorado Immunization Information System
Reminder

March 02, 2011

Reminder Criteria

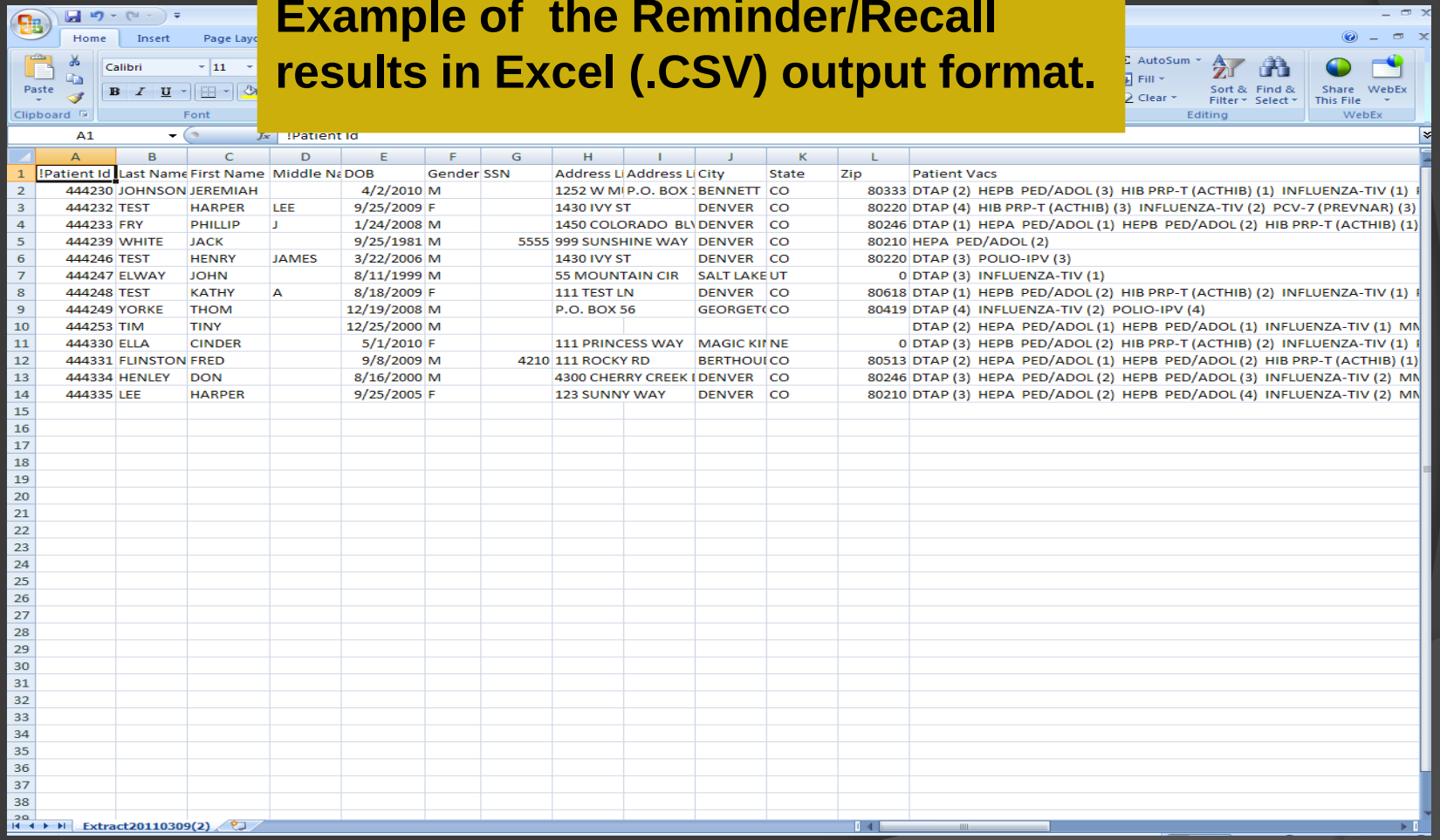
Reminder Run Name:	HS TEST	**Run Schedule Date:** 08/25/2010	**Run Completed**
Provider:	IZ R US PROVIDER TYPE 3	**Reminder Date From:** 08/25/2010	**Reminder Date Thr**
Clinic:	IZ R US CLINIC	**Age Range From (months):**	**Age Range Through (mor**
Vaccine Series:	Tetanus containing - All, Polio - All, MMR/Measles - All, Hib - All, HEPB - All, HEPA - All, Pneumo - All, ROTA - All, Varicella(CPOX) - Influenza - All, Meningococcal - All, HPV - All		
Other Criteria:	Include Recommender Reminders/Recalls? Y Include Patients Due For Vaccinations (Reminders)? Y Include Patients Overdue For Vaccinations (Recalls)? Y		

Name	Contact Info	Vaccinations
FRY, PHILLIP (444233) - DOB: 01/24/2008 1450 COLORADO BLVD DENVER, CO 80246	Home Phone: Work Phone: Cell Phone: Pager:	DTAP (1), HEPA, PED/ADOL (1), HEPB, PED/AD PRP-T (ACTHIB) (1), MMR (1), PCV-7 (PREVNA (VARIVAX) (1)
Reminder Date: 02/24/2008 Age At Date: 0Y 1M 0D Most Recent Vaccination: 08/02/2010 VFC Eligibility: Not VFC Eligible Vaccination History: POLIO(08/02/2010) HEPB(01/24/2008)		
TEST, HARPER (444232) - DOB: 09/25/2009 1430 IVY ST DENVER, CO 80220	Home Phone: Work Phone: Cell Phone: Pager:	HEPA, PED/ADOL (2), HEPB, PED/ADOL (4), MMR (2), VAR (VARIVAX) (2)
Reminder Date: 09/22/2010 Age At Date: 0Y 11M 28D Most Recent Vaccination: 02/15/2011 VFC Eligibility: Not VFC Eligible Vaccination History: TETANUS CONTAINING(08/25/2010) POLIO(08/25/2010) HIB(08/25/2010) HEPB(08/25/2010) PNEUMO(08/25/2010)		

Page 1 of 2

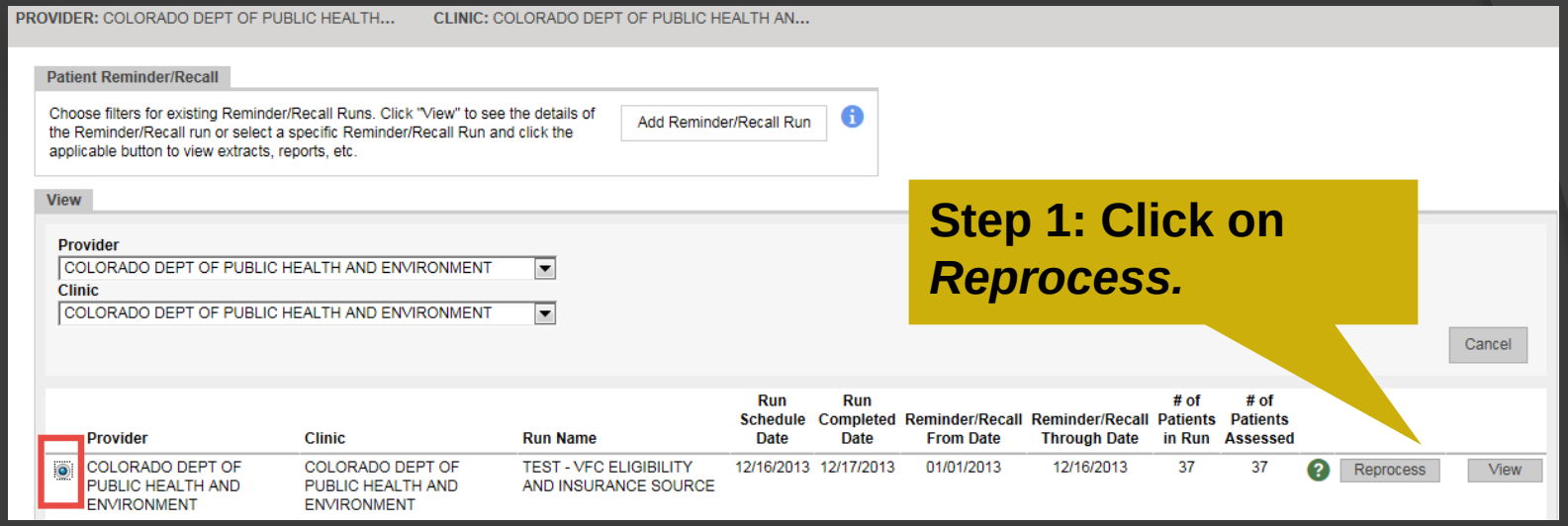
REMINDER/RECALL EXTRACT: EXCEL (.CSV) OUTPUT

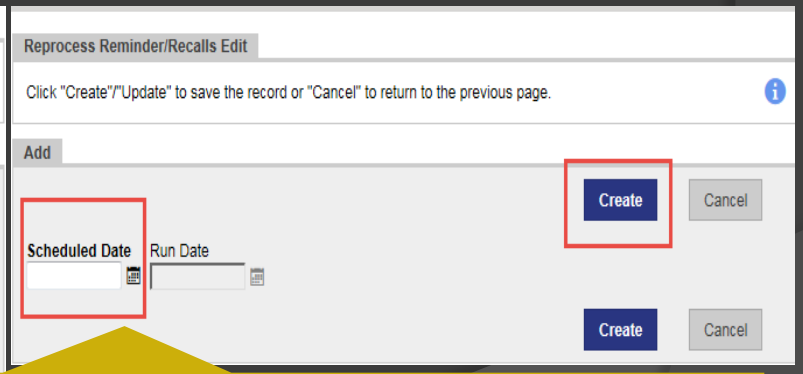
Example of the Reminder/Recall results in Excel (.CSV) output format.



!Patient Id	Last Name	First Name	Middle Na	DOB	Gender	SSN	Address Li	Address Li	City	State	Zip	Patient Vacs
444230	JOHNSON	JEREMIAH		4/2/2010	M		1252 W MI	P.O. BOX 1	BENNETT	CO	80333	DTAP (2) HEPB PED/ADOL (3) HIB PRP-T (ACTHIB) (1) INFLUENZA-TIV (1)
444232	TEST	HARPER	LEE	9/25/2009	F		1430 IVY ST		DENVER	CO	80220	DTAP (4) HIB PRP-T (ACTHIB) (3) INFLUENZA-TIV (2) PCV-7 (PREVNAR) (3)
444233	FRY	PHILLIP	J	1/24/2008	M		1450 COLORADO BLV		DENVER	CO	80246	DTAP (1) HEPA PED/ADOL (1) HEPB PED/ADOL (2) HIB PRP-T (ACTHIB) (1)
444239	WHITE	JACK		9/25/1981	M	5555	999 SUNSHINE WAY		DENVER	CO	80210	HEPA PED/ADOL (2)
444246	TEST	HENRY	JAMES	3/22/2006	M		1430 IVY ST		DENVER	CO	80220	DTAP (3) POLIO-IPV (3)
444247	ELWAY	JOHN		8/11/1999	M		55 MOUNTAIN CIR		SALT LAKE	UT	0	DTAP (3) INFLUENZA-TIV (1)
444248	TEST	KATHY	A	8/18/2009	F		111 TEST LN		DENVER	CO	80618	DTAP (1) HEPB PED/ADOL (2) HIB PRP-T (ACTHIB) (2) INFLUENZA-TIV (1)
444249	YORKE	THOM		12/19/2008	M		P.O. BOX 56		GEORGETO	CO	80419	DTAP (4) INFLUENZA-TIV (2) POLIO-IPV (4)
444253	TIM	TINY		12/25/2000	M							DTAP (2) HEPA PED/ADOL (1) HEPB PED/ADOL (1) INFLUENZA-TIV (1) MN
444330	ELLA	CINDER		5/1/2010	F		111 PRINCESS WAY		MAGIC KI	NE	0	DTAP (3) HEPB PED/ADOL (2) HIB PRP-T (ACTHIB) (2) INFLUENZA-TIV (1)
444331	FLINSTON	FRED		9/8/2009	M	4210	111 ROCKY RD		BERTHOUI	CO	80513	DTAP (2) HEPA PED/ADOL (1) HEPB PED/ADOL (2) HIB PRP-T (ACTHIB) (1)
444334	HENLEY	DON		8/16/2000	M		4300 CHERRY CREEK I		DENVER	CO	80246	DTAP (3) HEPA PED/ADOL (2) HEPB PED/ADOL (3) INFLUENZA-TIV (2) MN
444335	LEE	HARPER		9/25/2005	F		123 SUNNY WAY		DENVER	CO	80210	DTAP (3) HEPA PED/ADOL (2) HEPB PED/ADOL (4) INFLUENZA-TIV (2) MN

HOW TO REPROCESS A REMINDER/RECALL





REPROCESS UP-TO-DATE REPORT OUTPUT EXAMPLE

Scheduled Run Date	Completed Date	Total Patients	Not Up-to-Date	Up-To-Date	Not Up-To-Date		
03/31/2014	04/01/2014	2064	1918				View

Once CIIS has completed reprocessing your reminder/recall, you will be able to view an *Up-to-Date* and a *Not Up-to-Date* report by clicking on the corresponding *Printer* icon.

Here is an example of the *Reminder/Recall Reprocessed Not-Up-To-Date* report

Reminder/Recall Reprocessed Patients Not Up-To-Date

Original Reminder Criteria **Reprocessed as of** **03/13/2014**

Reminder Run Name:
Run Schedule Date: 03/11/2014 **Run Completed Date:** 03/12/20
Provider:
Reminder Date From: 03/11/2014 **Reminder Date Through:** 03/11/20
Clinic:
Age Range From (years): 4 **Age Range Through (years):** 5
Vaccine Series: Tetanus containing - All, Polio - All, MMR/Measles - All, Hib - All, HEPB - All, HEPA - All, Pneumo - All, ROTA - All, Varicella(CPOX) - All, Influenza - All, Meningococcal - All, HPV - All, Zoster - All

Other Criteria:
Include Patients Due For Vaccinations (Reminders)? Y
Include Patients Overdue For Vaccinations (Recalls)? Y
Exclude Patients with Less than 2 non-Influenza/H1N1 Vaccinations? Y
Gender: Both

Name

Big Bird
25 Nest Lane
Denver, CO

DOB:
County: Denver

Contact Info

Home Phone:
Work Phone:
Cell Phone:

Gender: Male
Email:
Reminder Date: 09/15/2011
Age At Date: 1Y 9M 28D
VFC Eligibility:
Primary Contact:
Relationship:
Most Recent Immunization Date: 10/21/2011
Most Recent Refusal:
Most Recent Immunization Clinic:

Immunizations Originally Recommended

Status: NOT UP TO DATE

Series	Dose	Vaccination	Date
Influenza	4		
MMR/Measles	2		
Polio	4		
Tetanus containing	5		
Varicella(CPOX)	2		

Based on reprocessing the reminder/recall, this patient is still not up-to-date on these vaccinations.

THINGS TO CONSIDER

- When running a reminder/recall, remember to **LIMIT** the *Age Range* so that the system is not overloaded.
- Patients can be included in many reminder/recalls.
  - To prevent notifying patients multiple times during the same period, some care should be given to how reminder/recalls are generated.
    - We recommend that patients be included in no more than 3 – 5 recalls within the same age range and criteria.
  - A *Patient Reminder/Recall* report is a static "snapshot" of the data involved.
    - If you do a reminder/recall run and then wait an extended period of time to send notifications, any immunizations administered to the patient during the interim will not be included in the report. This could lead to notifying patients who have received immunizations between the time you ran the report and the time you sent the notification.

PRACTICE EXERCISE

- Add a reminder/recall run
  - **Note**: Remember, if you schedule your run for the same day it will take overnight to complete.
- Once your reminder/recall run has been completed, practice:
  - Viewing the details of the run.
  - Generating a report in the different formats, e.g., Reports (pdf), Extract (Excel).

RESOURCES

- CIIS User Support:
  1-888-611-9918, option 2
- CIIS General Email:
  cdphe.ciis@state.co.us
- CIIS Training and Outreach Coordinator:
  Phyllis.Bourassa@state.co.us
- CIIS Geographic Recall Coordinator
  Linda.Stremming@state.co.us
- For online training, webinars, job aids, and quick guides, visit www.ColoradoIIS.com. Next, click *Training* and select *CIIS General health care providers.* Now select the link that best fits your training needs.